GENERATE

T · E · WEALTH

Your life. Your legacy.

Generating wealth requires partnering with the right name.

ACCELERATING YOUR FINANCIAL GOALS BEGINS WITH TAKING A 360° VIEW.

Hard work and success tend to go hand in hand. But when it comes to accelerating financial goals, success also requires knowing how to manage and invest your hard-earned resources. That's where T.E. Wealth comes in. We help executives achieve financial goals with customized 360° financial strategies that consider risk tolerance levels, life stages, goals and most importantly – dreams. Best of all, our executive financial counsel services are all readily available through your corporate benefits program. Ready to get started? So are we.

Private, one-on-one counsel

The deep expertise of T.E. Wealth's accredited Financial Planners and Investment Counsellors means you'll receive a financial strategy uniquely tailored to your needs and dreams – one that's easy to understand, easy to implement and evolves with you as you mark each life milestone. Without question, you could reach your goals on your own. But if there's a better way to get there, why not follow it?

360° view

T.E. Wealth's unique approach involves considering your entire financial picture from the very start. From there, we work with you to devise proactive risk management solutions that evolve with you through various life stages such as marriage, property purchase and retirement. Recognizing that your professional relationships may already have been long established, we are geared to work with your accountants, lawyers and other advisors to ensure your best interests are always the priority.

Our financial concierge services are customized to suit your particular needs and can involve any or all of the following:

- Financial Planning
- Company Incentive Plan Guidance: how to maximize value
- Tax Management and Preparation
- Career Transition Financial Analysis and Planning
- Insurance Review and Planning
- Financial Planning and Management through Health Crisis
- Retirement Planning
- Estate and Family Succession Planning
- Charitable Gift and Legacy Planning
- Financial Analysis and Planning through Separation and Divorce
- Survivor Counselling
- International Advisory Services

Expertise

T.E. Wealth understands executive financial counsel in Canada because we helped create it over 45 years ago. With an average of almost 15 years in their respective disciplines, our experts have vast experience in all aspects of financial planning, economic cycles and market corrections, making them well equipped to navigate fluctuations and nuances in ever-changing global markets.

Holding combined accreditations including Certified Financial Planner, Registered Financial Planner, Certified Professional Accountant, Trust and Estate Practitioner, Certified Professional Consultant on Aging, Financial Divorce Specialist and Chartered Financial Analyst, our experts guarantee that your financial plan will meet the highest scrutiny.

Integrity

Our certified financial planners and investment counsellors provide the most comprehensive advice, ensuring that your executives' best interests always come first.

Ready to take your business to the next level? Talk to us.

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To learn more about T.E. Wealth, please contact us: www.tewealth.com · 1-888-505-8608

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